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ABSTRACT

Various theoretical approaches for explaining both the timing and focus of educational reform efforts, are discussed. Both national-level and world-system explanations as well as some suggestions for combining the contributions of both levels of analysis are examined. Additionally with respect to both levels of analysis, explanations from equilibrium perspectives are contrasted with those from conflict perspectives. The concept of the state is also given attention. The concept of educational reform as a form of social interaction in economic, cultural, and political context is developed. Besides being oriented to theory building as a scholarly activity and to comparative analysis as a basis for informing policy, the objective is to identify and clarify a number of issues to facilitate understanding of and plan for progressive action with respect to current and future reform movements. (79 references) (SI)

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NATIONAL AND WORLD-SYSTEM EXPLANATIONS OF EDUCATIONAL REFORM*

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NATIONAL AND WORLD-SYSTEM LEVEL EXPLANATIONS OF EDUCATIONAL REFORM

Introduction

Since the mid-1970s we have witnessed a considerable degree of educational reform rhetoric and activity in many diverse nations. As Gumbert (1988:3) observes, "in the last several years attempts to reform education have been prominent in many countries with quite different social, political and economic systems." Educational reform, of course, is not only a recent phenomena but has a long history. Referring to a volume, Educational Reformers, written by Quick in 1868, Simmons (1983b: 4) notes that "efforts to reform the schools are almost as old as the modern school itself."

In this paper we discuss various theoretical approaches for explaining both the timing and focus of the reform efforts. We examine both national level and world-system explanations and offer some suggestions for combining the contributions of both levels of analysis. Additionally, with respect to both levels of analysis we contrast explanations from equilibrium perspectives with those from conflict perspectives, which we find more compelling. We will also devote attention to the concept of the state.

Like others (e.g., Gumbert, 1988; Paulston, 1977; Simmons, 1983a; Wirt & Harmon, 1986a), we are attempting to develop our understanding of educational reform as a form of social interaction in economic, cultural, and political context. However, besides being oriented to theory building as a scholarly activity and to comparative analysis as a basis for informing policy, our objective is to identify and clarify a number of issues to

facilitate our understanding of and plan for progressive action with repect to current and future "reform movements."

Defining Educational Reform

Reform in education as in other institutions may be seen as "symbolically mediated and purposive social processes aiming at changes in the structure and functioning of some social system" (Dunn, 1982: 302). Educational reforms, then, may be categorized in terms of the intended consequences for educational systems of the social tranactions involved. For example, educational reforms have been focused on changes in the following aspects of education systems (see Ginsburg, Wallace, Miller, 1988; Merritt & Coombs, 1977; Sack, 1981; Simmons, 1983a, 1983b):

a) size or number of students, teachers, administrators, and buildings;

b) goals and objectives;

c) policy-making and admininistrative/managerial system or power structure;

d) financing and budget process;

e) system organization or the types, statuses, and levels of as well as links and ages of transition between educational institutions;

f) curriculum or content and organization of what is taught;

g) pedagogy or social relations of teaching and learning;

h) selection, evaluation, and promotion criteria and procedures for students; and

i) selection, evaluation, and promotion criteria for educational workers (teachers, administrators, etc.).

However, not all educational reform activities can be understood as real efforts to change some aspect of educational systems. As Campbell (1982: 328) suggests about reform activity in general, educational reform may be seen as a "placebo", that is, "symbolic gestures designed to indicate governmental [etc.] awareness of problems and sympathetic intentions, rather than serious efforts to achieve social change." Or as Mitchell (1987: 128) comments: "educational reforms are often designed to resolve the political [cultural and economic] problems at hand and restore order rather than truly examine what ails society and its schools and strive to correct discovered deficiencies" (see also Weiler, 1988). Thus, we need to examine both the manifest and latent functions or consequences (cf. Merton, 1968) of educational reform movements for both education and society.

In defining educational reform in terms of its latent and manifest functions for education, culture, politics, and economy, we do not adopt the assumption imbedded in structural functionalist analyses that the intended or unintended changes (or lack thereof) are necessarily "for the better" as, for example, Merritt and Coombs (1977: 254) do. Thus, when some writers concerned with educational reform (e.g., Merritt & Coombs, 1977; Sack, 1981; Simmons, 1983a, 1983b; Spaulding, 1988) characterize the purposes of educational reform as **improving** the system's effectiveness, efficiency, and relevance or **increasing** equality, they are only focusing on certain possible outcomes viewed "positively" from one perspective.

One problem with viewing the consequences (or even the goals) of educational reform in this way is that such goals may be contradictory or incompatible (Altbach, 1974; Apple, 1986; Carnoy, 1976; Ginsburg, Wallace, & Miller, 1988). Thus, from one perspective improving the effectiveness,

efficiency, and relevance of the education system by improving its "articulation with the world of work" (Sack, 1981), may in fact, increase or at least reinforce inequalities in education and society.

A second problem with this view derives from the fact that one must assume a consensual model of societal or global relations. In contrast, we think there are reality-based differences in perceptions of what the goals of education should be and in what ways education should prepare future generations for their roles in society. Thus, it is likely that many consequences will be viewed differently by different groups regarding whether effectiveness, efficiency, and relevance have been improved. As Altbach (1974) observes, what is constructive change to some people may be seen by others as either tokenism or destructive or regressive change. For instance, an educational system can be viewed to be as either more or less effective and relevant when it prepares male and female students for "traditional," gender-differentiated roles that may still characterize a particular society. And the same efforts to change curriculum, pedagogy, and power structure may be perceived as oriented to improving the efficieny, effectiveness, and relevance of educational systems and/or as focused on moving the system in the wrong direction, while at the same time proletarianizing educators (Ginsburg, Wallace, & Miller, 1988).

Explaining the Timing and Focus of Educational Reform

Over a decade ago Merritt and Coombs (1977: 249) commented that comparative educationists have tended to view "educational systems as largely autonomous, somewhat insulated, decision areas." For example, Beeby (1966: 69), adopting what we will discuss below as an evolutionary

variant of equilibrium theory, stresses the autonomy of education systems when he claims that "there are certain stages of growth through which all school systems must pass ... [and that] the stage of development is determined by ... the level of education of the teachers, and the amount of training they have received" (Beeby, 1966: 69). And, more recently, Green, Ericson, and Seidman (1980) suggest a high degree of autonomy for the education system, emphasizing that the education system of a particular society has a "life of its own." They argue that an educational system has a "logic" or "practical rationality" such that "the behavior of the system, its inherent processes, may become intelligible in a way that is independent of differences in political and economic ideology" (p. xiii).

Merritt and Coombs (1977: 249) go on to say, nevertheless, that "the evidence is now incontrovertable that in most nations virtually all educational decisions, certainly including efforts at major reform, are highly interrelated with concurrent events in the cultural, social, economic, and political realms." Simmons (1983a: 72) profers a similar claim, that "[p]olitical and economic factors are more important in shaping educational reforms than are factors internal to the educational system itself."[1] In agreeing with this, however, we do not adopt an overly-deterministic perspective in which education systems and the actors involved in them are completely structured by external systems or forces. As we will discuss further in the concluding section of this paper, education may be interrelated to broader societal dynamics but be relatively autonomous nonetheless.

Regardless of one's assumption about the degree of relative autonomy of the education system, one may incorporate cultural, economic, and political

dynamics into one's model for explaining educational reform. In examining the relationships between education and culture, economy, and politics, however, one may draw on assumptions of equilibrium theory and/or conflict theory, and one may conceptualize these relationships as occuring at the national and/or the world-system level. Therefore, we organize our discussion in this paper with reference to the following four general theoretical models defined by the cross-classification of the two above mentioned dichotomies: 1) national level equilibrium, 2) national level conflict, 3) world-system level equilibrium, and 4) world-system level conflict. While there is some important intra-model variation, each of the four approaches is built on a basic set of assumptions about the way education functions in political, economic, and cultural context. In discussing these four models we will argue the advantages of the conflict approaches for explaining educational reforms, while also clarifying why we believe that the contributions of both national and world-system level analyses are needed. In addition, we will devote special attention to the "state," a concept that is central to understanding educational reform from at least a conflict perspective whether focused on a national or world-system level of explanation.

National Level Explanations of Educational Reform

In his "review of major theoretical perspectives on educational change-cum-reform at the national level," Paulston (1977: 370) distinguishes between "equilibrium" and "conflict" paradigms (see also Paulston, 1983; Simmons, 1983b). Within the equilibrium paradigm change in education tends to be portrayed as natural movements toward ever higher stages of societal

development or adaptations required by system imbalances or societal needs. In equilibrium approaches it is assumed that society is fundamentally consensual and operates based on homeostatic principles. The "equilibrium paradigm ... stresses the importance of functional integration, harmony, and stability [and] it assumes a priori that all members of society implicitly agree what the functional necessities are" (Simmons & Esping-Anderson, 1983: 423-24). In contrast, the conflict paradigm emphasizes "the inherent instability of social systems and the conflicts over values, resources, and power that follow as a natural consequence" (Paulston, 1977: 376). From a conflict perspective educational change occurs through conflict and competition between social class, ethnic, national, religious, and gender groups, whose interests are incompatible, or when structural contradictions (e.g., in the economy) are not being successfully mediated.[2]

National Level Equilibrium Approaches

In national level equilibrium approaches the analysis of educational reforms is focused within the boundaries of nation-states and functional, evolutionary, or system theory assumptions dominate. Paulston (1983: 28) summarizes the structural-functionalist view of reform in education as:

> the result of interaction between society and the schools and follows five steps: (1) a need arises in society; (2) the school is assigned the task of meeting the need; (3) change in the educational structure takes place to accomodate the new function; (4) the new role is assumed by the schools; and (5) latent and manifest changes take place in society as a consequence of the new educational functions.

Merritt and Coombs (1977) provide an example of this approach in explaining why "education in Europe and North America change[d] from a cottage industry

into a gigantic, highly bureaucratized enterprise" (p. 247). They see the explanation of such changes in education to reside in changing societal needs for "[1] workers with such basic skills as reading, writing and arithmetic[,] ... [2] men [and women?] who could handle the increasingly complicated technologies and tactics of warfare[, and] ... a literate and politically sophisticated electorate." Education is changed because the needs of modern, industrialized, and urbanized society are not being fulfilled by the existing organization, content, and processes of education. The education system, as part of a larger homeostatic social system characterized by consensus, is seen to evolve as society evolves or to adapt as functional incompatibilities or dysfunctions arise.[3] As societies become "modern" and "rational" their needs change and educational systems must adjust to this change. The timing and focus of reform of the education subsystem are determined by the needs of the society to maintain an equilibrium in a homeostatic system undergoing change in other subsystems.

National Level Conflict Approaches

From a conflict perspective we do not view educational reform as part of a homeostatic system's response to functional incompatibility that may arise from time to time. Rather, educational reform (or educational change more generally) is seen to be part of on-going struggles between groups, whose interests are fundamentally in conflict, and in the context of social relations that are inherently contradictory. Especially those conflict approaches drawing on marxist perspectives (see note 2), explain the timing and focus of educational reform with references to class relations under the capitalist mode of production (or sometimes to gender and racial groups involved in contradictory social relations). For example, Carnoy and Levin

(1986: 37) explain that:

> The dynamic of education ... can best be understood as a condensation of a much wider social conflict inherent in capitalist development. The conflict pits forces for capitalist reproduction, as seen in the workplace, against forces for democratic participation, as seen in social movements ... the space for such struggles is provided by the state.

From this perspective education, the state, and other superstructural institutions mediate (or, alternatively, exacerbate) contradictions in the economic base of society, and as a result of this education and the state in capitalist societies contain contradictions as well (Apple, 1986; Baudelot and Establet, 1971; Carnoy, 1982; Ginsburg, 1988; Ginsburg, Wallace, & Miller, 1988; Levin, 1982). Dale (1982: 130) argues that the "dynamic for education systems" arises out of "three core problem areas confronting state education systems," which can only be solved by mutually contradictory dynamics. These core problems are the 1) "support of the capital accumulation process," 2) "guaranteeing a context for its continued expansion," and 3) "the legitimation of the capitalist mode of production, including the state's own part in it" (Dale, 1982: 132-33).

It is important to clarify, though, that from this perspective reform in education is not some natural evolutionary development or functionally necessitated adaptive response to the needs of the capitalist political economy. Instead, the contradictions within and between the economy and superstructural institutions, such as the state and education, constitute the terrain on which the bourgeoisie and the proletariat (and their allies within the middle classes and other groups) struggle. As Carnoy (1986: 84-

85) articulates it:

> Struggle in the superstructure is part of a conflict which pervades all capitalist society and feeds back on other conflicts. Moreover, the responses to conflicts in production and superstructure by dominant political/economic groups are also interrelated; efforts to suppress or co-opt worker demands in production are accompanied by efforts to reform (bring into correspondence) superstructure institutions like the schools.

Moreover, during periods of economic crisis in capitalist societies the tensions produced by these contradictions are heighted, thus, shaking up the terrain of struggle. And when possible, capitalists and their allies are seen to shift the focus of the crisis away from the economy to the state and education (Carnoy & Levin, 1986; Ginsburg, Wallace, & Miller, 1988). According to Habermas (1979: 74):

> [T]he origins of the crisis still lie in the economic system in capitalism but ... the Welfare State no longer allows the crisis to explode in an immediately economic form. Instead, ... the symptoms are displaced into strains within the cultural and social order. ... The result is a much bigger 'ideological discharge' than in [less crisis-like] periods of capitalist development.

Thus, the timing of major educational reform activities can be explained by the occurence of crises in the economy (as well as in contradictory gender and race relations; see Ginsburg, 1988). The focus of the reform would be shaped by struggles between classes and other groups, who are constrained and enabled by the contradictory dynamics within the economy, culture, education, and the state. While the focus of the crisis

may be deflected from the economy, issues addressed in reform efforts may still implicitly or explicitly concern the relation between education, the state, and the economy, in terms of the cost and control of education and the kind of workforce it is designed to produce.

World System Level Explanations of Educational Reform

In common with some of the national level explanations of change and reform in education, world system level analyses have focused on the state, specifically in terms of global trends of increases in state authority and power and of national government incorporation and control of education (Ramirez & Boli-Bennet, 1982; Ramirez & Rubison, 1979; Ramirez & Weiss, 1979). In analyzing states as well as culture, the economy, and educational systems, however, world system level approaches focus attention beyond the boundaries of the nation-state. As Meyer and Hannan (1979: 12) explain: "Modern states, economies and cultural systems are obviously ongoing constructions of worldwide processes -- affected by internal processes, true, but also by external ones." Or as Ramirez and Boli-Bennett (1982: 15) articulate it: "educational systems ... cannot be explained by standard comparative education discussions that treat national systems as essentially autonomous units developing in accordance with endogenous social and political forces" (see also Carnoy, 1976; Coombs, 1985; Ginsburg, Wallace, & Miller, 1988; Simmons, 1983a).

While a number of scholars in education have adopted the term world-system in their analyses, not all of them have followed a marxian conflict theory approach that has been characteristic of the more general theoretical and empirical work under the label of world system analysis (e.g., Hopkins &

Wallerstein, 1979; Rymalov, 1978; Wallerstein, 1974, 1980, 1988). Some have seemed to work within an equilibrium perspective, although focused globally.

World System Level Equilibrium Perspectives

John Meyer and some of his colleagues have tended to emphasize cultural rather than economic factors and to treat the dynamics from evolutionary, functionalist, or systems variant of equilibrium perspective. Meyer and Hannan (1979a: 298) refer to "a relatively unified cultural system." Boli, Ramirez, & Meyer (1986: 107-12) analyze how education has been influenced by a world cultural system:

> The striking thing about modern mass education is that everywhere in the world the same interpretive scheme underlies observed reality. ... [Schooling is] universal, standardized, and rationalized ... institutionally chartered to conduct the socialization of the individual as the central social unit. ... [As] a secular procedure for constructing the individual ... [schooling] helps meet the functional need for integration of the increasingly differentiated system.

From a world-system equilibrium vantage point educational systems change in relation to changed ideas in and needs of an increasingly global cultural system, described by Ramirez and Boli-Bennett (1982: 18) as the "ideology of citizenship" linked with the "ideology of the state" and the "ideology of the individual." Schools take on the function of creating citizens in response to the world cultural system and to the increasing interconnections among states in what Meyer and Hannan (1979a: 298) call a "densely linked" world economy.

Inkeles and Sirowy (1984) claim similarly that there is a tendency for all national educational systems in the world to converge toward a common

structure and set of practices. In the case of the more industrialized countries, change toward this common structure and practices is explained by the "'imperatives' built into the socio-technical systems ... which drive them to similar responses to common problems" (Inkeles & Sirowy, 1984: 139). For the less developed industrialized nations a somewhat different explanation is offered — one that is less explicitly structural functionalist, although still within an equilibrium perspective. In the case of less industrialized societies change in education is explained to result from borrowing structures and practices from the more developed nations. Such borrowing occurs because of the less developed countries' "integration into the networks of influence through which ideas and social forms diffuse" (Inkeles & Sirowy, 1984: 139). Thus, despite some national cultural, economic, and political dynamics tending toward divergence, there are greater global pressures toward convergence. These pressures, which at times get translated into educational reform movements, are diffused through a consensual world cultural system by world leaders and international agency officials who encourage all national educational systems to accept common international standards. In discussing this diffusion process Inkeles and Sirowy (1984:159-160) stress the role of international agencies, which because of their "moral force" and through their "persuasive efforts" are able to stimulate needed change even under difficult circumstances:

> Diffusion surely must also play a major role as international standards come to be widely accepted, especially those set by the world's leaders or those advocated and encouraged by international agencies such as the OECD, UNESCO, the IMF and the World Bank. The propensity to imitate the leaders, the moral force of international organizations, and the

persuasive efforts of experts and technical consultants all can act to move countries to a common standard internationally even when their economic development would not require, and indeed must often strain to support, the educational programs favored by the international elite.

Philip Coombs (1968, 1985) also provides an analysis based on an equilibrium perspective, and at the same time he may be considered a major actor contributing to the diffusion of ideas about needed educational reform in the world cultural system. It is interesting to speculate that Coombs' book, The World Educational Crisis (1968), which he describes as "widely read throughout the world" and which "helped to precipitate a widespread debate over and a reexamination of previously accepted educational orthodoxies" (Coombs, 1985: 7), may have shaped the discourse and action related to educational reform in the 1970s and 1980s. Coombs suggested that the world educational crisis was created by a growing "disparity" in all societies between educational systems and their national environments, especially the economy. He also lent his voice to concerns about the rising cost of schooling. Both of these problems as well as increasing unemployment among the educated populace were seen to require managerial solutions in which the education system would need to be restructured to better fulfill its functions with respect to the economy.[4]

World-System Level Conflict Approaches

In contrast to the more equilibrium-like approaches to analyzing change and reform in education from a world systems perspective, we find more compelling approaches that stress assumptions associated with a conflict paradigm (e.g., Carnoy & Levin, 1986). These approaches have given more

attention to the economy, stressing that the world system is a capitalist system, incorporating capitalist as well as nominally socialist societies (Arnove, 1982; Chase-Dunn & Rubison, 1979; Ginsburg, Wallace, & Miller, 1988; Wirt & Harmon, 1986a). From a world-system conflict perspective both "capitalist" and "socialist" societiel are stratified into "core" and "peripheral" countries (Altbach, 1982; Carnoy, 1976; Zachariah, 1986). This does not entail ignoring cultural or political spheres, but to emphasize that these spheres must be understood in relation to the economic base of the world system.

In this context capital-labor relations are seen to take on a more complex form. In core societies there is "relatively 'free' wage labor," while in the periphery "labor is subject to a variety of forms of coercion," such that through multinational corporations capitalists in the core societies can "appropriate a portion of the surplus value produced in the peripheral areas" (Chase-Dunn & Rubison, 1979: 277-78). Thus, class struggle and conflict in the Third World or peripheral areas are:

> not simply between dominant and subordinate classes in a given country, but between subordinate classes (sometimes including fractions of the bourgeoisie and petty bourgeoisie whose interests are contrary to transnational development) and an alliance of local dominant groups with a transnational technocracy [or economic elite], whose power lies not only in its financial strength but also in the willingness of metropolitan governments to support its cause with military backing. (Carnoy, 1986: 82)

Given these assumptions as a starting point, educational policy and practice, and efforts to reform these, "are largely conditioned by the world

system of capitalist production, by the way that the particular country's production has developed in the world economy, and by the way class conflict has developed in that context" (Carnoy & Levin, 1986: 39). For societies in the periphery the construction and reform of education must be seen in relation to social relations of domination and subordination characteristic of the world capitalist system (Weiler, 1988). Reforms that are implemented not only would require the support of local economic elites, but also powerful groups outside the country (Carnoy, 1976). As Altbach (1982: 470) explains it:

> Dependency is normal [only] in the sense that it reflects the prevailing patterns of power and wealth in the world, not only in military and economic terms, but also with regard to education — the design of schools and curricula, the production and distribution of knowledge. (Altbach, 1982: 470)

Educational reform in core nations also would need to be analyzed in relation to dynamics within the world system (Ginsburg, Wallace, & Miller, 1988).

In examining more concretely the impact of the world system on educational reform, we need to consider the role of corporate foundations, universities, multinational firms, and international organizations and bilateral/multilateral agencies (Arnove, 1982; Boli-Bennett, 1979; Zachariah, 1986). Unlike the treatement of the role of international organizations within an equlilibrium perspective (see above discussion of Inkeles & Sirowy [1984]), however, from a conflict perspective we do not claim these and other organizations operate in a consensual evironment and primarily through persuasion or because of their moral force. Instead,

economic, political, and military power need to be emphasized. Moreover, the changes "encouraged" cannot be seen to serve the interests of most people, but rather primarily those who benefit by the existing unequal social relations in the world system. For example, Berman (1983) analyses the role of the Carnegie, Ford, and Rockefeller Foundations in shaping and reforming higher educational institutions and teacher education and public administration programs in the Third World as well as their related involvement in institutions in the United States. He argues that such activities should be seen as part of the foundations "role in support of United States foreign policy objectives and ... sustaining the world capitalist system" (Berman, 1983: 3).

Universities and academic in the United States (and other nations) have also played a part in planning and implementing educational reform, not only domestically (e.g., Powell, 1980) but also internationally. For instance, Gonzalez (1982) discusses the involvement of the University of California at Berkeley in developing and attempting to implement Plan Basico in Colombia in the 1960s. This university reform project, coordinated by the U. S. Agency for International Development, was designed to reorganize and centralize campus administrative structures, thus reducing the power of faculty members; depoliticize student culture; and re-orient the curriculum toward training technical personnel. Gonzalez views these actions as an example "imperial reform in the neo-colonies," in which "[c]orporate foundations, major universities, and multilateral international financial institutions combined to provide the funds, material, research personnel, and political support to develop plans for the reform of Third World educational systems" (1982: 332).

Silva (1980a, 1980b) also focuses attention on the role of universities in what he terms the centers of two major trading blocks: China and the Soviet Union in the "East" and the United States in the "West." The greater accumulation of wealth in the core countries of each trading block is used partly to develop more and more complex universities, which serve as a knowledge production apparatus. Knowledge moves from the center to the periphery (see also Altbach, 1982) of the trading blocs, with nations in the periphery accepting the transference of knowledge, even though it rarely addresses their needs. This paradox is due to the willingness of the 'cultural elites' in the periphery to use "the standards of the center to guide their judgements about importing ideas" (Silva, 1980b: 67). While this stratified system of knowledge production and consumption has a number of implications, it clearly bears on the circulation of ideas and practices for reforming education.

Multinational corporations should also be seen as playing an important role in influencing the timing and focus of educational reform, both in the center and periphery. Certainly, the practices and demands of large business and industrial firms have shaped the nature of the education system in England, France, and the United States (Archer, 1979; Bowles & Gintis, 1976; Katz, 1968, 1975). More recent educational reforms in England and the United States have also witnessed prominent involvement of corporate leaders. And multinational corporations have constituted a substantial, if not always visible, force in efforts to reform education in Third World societies. For example, Klees and Wells (1983) discuss how a rise in industrial activity in El Salvador, stimulated by multinational corporations, was associated with an effort to revise the secondary school

curriculum and introduce an educational television system. These reforms were designed to provide the types of skills and attitudes demanded by foreign capital. This in turn fostered a greater dependence on foreign investment to employ the new workers produced by the expanded school system (Klees, 1983: 339). And with this economic dependence came substantial military aid to a series of Salvadoran governments which have attempted to keep an impoverished exploited, and oppressed worker and peasant population in that position.

Often the interests of owners of multinational capitalist firms have coincided, but not necessarily accidentally, with the initiatives of foundations, international organizations, and bilateral agencies. Altbach (1988: 137) comments on the significance of such institutions:

> Since World War II data collection, research, and recommendations for policy in education have depended, to a significant extent, on international organizations. ... At the international level, UNESCO and the World Bank have been the key organizations. National agencies such as the Canadian International Development Research Centre (IDRC), the Swedish International Development Agency, the U.S. Agency for International Development, and a few private foundations such as the [Van Leer,] Ford and Rockefeller foundations have been active as well.

While not wanting to argue that all of these organizations serve the same interests all of the time, we see the ways in which dynamics in the world economic and cultural systems impinge on different nation-states as affected by the workings of these organizations. Moreover, through financial assistance (or refusal of such aid) as well as through specific "development" or "reform" projects these organizations have affected in

different ways reform efforts in education. For instance, Altbach (1988: 139) discusses that:

> A large number of countries are dependent on external financing for increasing proportions of their investment ... in education. ... [Such international] financing is increasingly linked to policy adjustments deemed necessary for balanced and healthy development as defined by [the international financial institutions] experts.

This is true for Third World nations as well as countries such as Britain (Hargreaves, 1986).

Educational reform dynamics, however, should not be conceived of as a sort of functional response to the needs of economic elites or of the world capitalist system. From a marxist conflict perspective change in education or other aspects of any state must be understood in a more complex and dialectical fashion. It may be true that peripheral states are more effective in controlling labor (including their wages, organizing efforts, political activity, and migration) than they are at regulating multinationals and the circulation of capital (Chase-Dunn & Rubison, 1979). And it may also be that "economic and political crises in the advanced capitalist societies ... are out of control of the local dominant class" (Carnoy, 1986: 83). Nevertheles, regardless of a society's location along the core-periphery dimension, it is still a part of the world system. And because of the contradictions in the world capitalist system and (as will be discussed more fully below) the contradictions within the state, the dynamics of the global economy do not determine exactly how education and the state in any society are structured or restructured.

Thus, national (and regional/local) cultural, political, and economic

factors must be considered when explaining the timing and focus of educational reform. They should be examined not because they are the total source of explanation, but because they interact with dynamics set in motion by contradictions and crises in the world capitalist economic system (Ginsburg, Wallace, & Miller, 1988). For instance, nation-states in the core and the periphery may be seen as active in relation to the world economy in general and to mulitnational firms, corporate foundations, universities, international organizations, and bilateral agencies. They do not just respond to what is offered, nor do they merely accept what is given, but economic and state elites (among other less powerful actors) can be seen to actively seek aid for their own purposes or attempt to redirect the uses of resources provided for other tasks. As a beginning toward providing a more dialectical explanation of educational reform in the context of a world system we turn to a discussion of the concept of the state.

Notes on the Concept of the State

From the above discussion we can see that the "state" is a key concept in both national-level and world-system level analyses, especially within marxist conflict approaches. Thus, it is important to clarify how the state may be conceptualized. From one vantage point the state is treated as the government. But the state may also be conceptualized to include nongovernmental organizations which are financially supported through tax revenues (grants or tax breaks) and that perform functions of the state apparatus. Some analyses of the state emphasize its political form -- for example, representative democracy or authoritarian dictatorship. Others

seem to categorize states on their national ethnic as religious character, as in a Jewish state or an Islamic state. While other approaches highlight its economic functions -- referring, for example, to feudal, capitalist, socialist, or communist states. Additionally, certain conceptualizations characterize the state as a mechanism through which popular opinions or dominant group interests are normally realized, while others treat the state as a site struggle or as a location for contradictory dynamics.

Here we will emphasize the state in relation to the economy, in particular capitalist economies or economic dynamics within the world capitalist system. However, we want to clarify that "the state is not a monolith; there are differences within and between its various apparatuses in their prioritizing of demands made upon them and in their ability to meet those demands" (Dale, 1982: 135). As Grace (1987: 196) observes, drawing on McLennan (1984: 3), "the State in education is understood not as a single and unified entity but as a set of agencies, departments, tiers and levels, each with their own rules and resources and often varying purposes." Because of this, the state, which we conceive as encompassing more than the agencies of local and national governments, embodies contradictions and is a site of struggle, at least in capitalist economies where a structure of representative democracy exists.

We agree with Urry (1981: 102) that the "state ... is never simply omnipotent, nor does it simply react to the demands and the needs of the economy. ... Rather the state itself is to be seen as actively seeking to establish and sustain a particular constellation of social forces." This is not to argue that the state is such a heterogenous entity that it is irrelevant or operates neutrally in relation to the economy or with respect

to educational reform. It is only to indicate, as Dale (1982: 131) notes, that "the functions of the State in capitalist societies are given not by the direct control of capitalists or capitalist sympathizers within the state apparatus, but are in fact objectively given by the imperatives of the maintenance and reproduction of the conditions of existence of the capitalist mode of production." That is, the state must ultimately reproduce a particular set of social relations, including relations of production, because the revenue which sustains its operation depends in part (via taxation) on the accumulation (of surplus value) process (see also Carnoy, 1986; Ginsburg, Wallace, & Miller, 1988; Offe and Ronge, 1981).[5]

Thus, although relatively autonomous from the economy, the state is tied to the extant relations of production and infused, in the case of capitalist political economies, with the contradictions of capitalism (Holloway & Picciotto, 1978). These contradictory dynamics -- for example, accumulation and reproduction, create space for the state's relative autonomy. As noted above, the state needs for its own survival to foster the process of accumulation, that is, to maintain economic returns to capital in the context of declining rates of profit. At the same time, the state is involved in reproduction, that is, organizing and legitimating social relations appropriate to the means of production.

As part of the state an education system is an important site in which these contradictory functions are performed and contested. It is within the space created by contradictions internal to and between the state, education, and the economy that such struggles and contestations take place. And it is within these processes that education is structured and restructured, often with implications for the professionalization or

proletarianization of educational workers (Ginsburg, Wallace, & Miller, 1988). Thus educators must be part of the focus in analyses of educational reform, both because their labor process may be the target of reform efforts, but also because educators can be seen to be key political actors in struggles in society (Ginsburg, 1989). And it should be clear that when we talk about education in relation to the state, we are referring both the "public" and "private" forms of preschool through graduate programs in which the formal locus of control may rest at the local, regional, or national level.

Nevertheless, the accumulation and reproduction processes are often contradictory. Thus, at the same time the state is facilitating accumulation and hence promoting the "needs" of capital, it is also retarding the accumulation process of capital as it siphons off funds from capital (and labor) in order to fund the activities (e.g., education) designed to reproduce (perpetuate and legitimate) extant relations of production. As Dale (1982: 135) explains:

> The central contradiction is ... that while the capitalist mode of production is driven by the creation ... and the realization of surplus value, the conditions for its success and reproduction can only be guaranteed through the extraction of some part of that surplus value by the state.[6]

Additionally, state activity, such as reforming education, tends to embody contradictory movements, as Carnoy and Levin (1986: 38) comment, between efforts to "reproduce the educational inequalities required for capitalist efficiency and those which equalize opportunities on behalf of social mobility and democratic participation."

The state's involvement in promoting and undermining capital, particularly in times of economic crisis, is partly the reason why the state often finds itself in a credibility or legitimation crisis (Habermas, 1976). Therefore, state dynamics, including efforts to propose and implement reforms in education, must be understood not just in relation to accumulation and reproduction processes of the economy, but also in terms of the state's activities designed to maintain or re-establish its own legitimacy. As Weiler (1988: 265) explains:

> As the modern state ... faces a chronic deficit of legitimacy, the recourse to the legitimating potential of symbolic action becomes an important strategy. ... The idea, it seems, is to maximize the political gain to be derived from the design of educational reforms and to minimize the political cost of implementing them.

The contributions of the state (or its constituting institutions, such as education) to processes of accumulation and reproduction, however, are not always fully appreciated. The state, because of the ideological manner in which it is characterized, and because of its relative autonomy, is often perceived as completely autonomous and neutral (Carnoy, 1986). Thus, as Young (1980) observes, the state can elicit social opinion (i.e., the residue of history, tradition, and established beliefs) or mold mass opinion (which is mediated by personal versus group interests), while seeming to mobilize public opinion (i.e., that which reflects genuine human interests and is derived from general population participative decision-making) (see also Ginsburg, Wallace, & Miller, 1988). In Poulantzas' (1975: 173) words: "By means of a whole complex functioning of the ideological, the capitalist state systematically conceals its political class character. ... This state

presents itself as the incarnation of the popular will of the people/nation."

Therefore, analyzing educational reform discourse as ideological work can be a fruitful approach to understanding what is occuring. For instance, based on a study of the 1968 higher education reform in Sweden, Ruin and Lindensho (1982) state that the "broad ... political and interventionist objectives - growth, equality, reform capacity and freedom of choice ... tended more and more to be reinterpreted towards narrower administrative goals of efficiency and [technocratic] rationality" (p. 3). They also note that this "new view ... help[ed] to create arguments and ideas ... [making] it possible to interpret ongoing developments in the sector, motivate them and provide alibis for them" (Ruin & Lindensho, 1982: 10).

It is not that all actors concerned with reforming the school are purposefully involved in distorting communication about education in the local, national, and global context. It is that those with greater control over and access to the public and private modes of mass producing and mass distributing discourse tend to define the major issues in particular ways that shape the overall discourse. The use of mass media and reports of government, corporate foundation, or international agency commissions can be seen as strategies for accomplishing this task.

Conclusions

In this paper we have contrasted national and world-system level explanations of educational reform. It is clear to us that one cannot adequately understand dynamics in nation-states or localities without taking into consideration developments in the world system. This, we argue, is

true not only for Third World nations, which constitute the periphery in a stratified world system, but also for core societies whether "capitalist" or "socialist." Therefore, when we examine educational reform efforts in any country or region, we need to investigate how the global structural and ideological context constrains and enables (cf. Giddens, 1976) individual and group actors' transactions concerning education. This means attending to the workings of the world economy, to the content and the processes of production and distribution of ideas in the world cultural system, and to the involvement of international organizations, bilateral agencies, corporate foundations, universities, and multinational firms.

Taking seriously the world-system level in our analysis, though, does not require that we ignore national (regional and local) level cultural, economic, and political dynamics. Thus, we agree with Simmons (1983a: 10) that "educational reform ... is shaped by a complex interaction among local, national, and international factors." Or as Wirt and Harmon (1986a: 4) explain, "national qualities operate like a prism, refracting and adapting [global] influences, without blocking all of them." We have given particular attention to the "state" and the way it functions in relation to dynamics in the world system. We would also focus our gaze on negotiations among groups inside and outside the education system as Archer (1979) suggests in her discussion of political manipulation, external transaction, and internal initiation.[7] Educational workers and other groups in a given society should be seen as setting goals, developing strategies, and drawing on ideology, political power, and financial resources in their struggles to achieve these goals. For instance, it has been suggested that even when educational reform is initiated by external forces, conceived as the demands

of economic elites for greater correspondence between education and the economy, the "educational system ... both resist[s] and accomodat[es] the reforms" (Levin, 1982: 317). As Apple (1986: 70) articulates it, "the school is not a passive mirror but an active force." The point of including in our analysis the world-system and national level structural and ideological contexts of education systems is not to identify how human activity involving educational reform discourse and action is determined. Rather, the point is to emphasize that dynamics in the world system constitute an important part of the terrain on which groups struggle over educational organization, goals, curriculum, pedagogy, financing, etc.

Agreeing with Wirt and Harmon (1986a) and others who work within equilibrium perspectives about the importance of analyzing the interaction of world-system and other levels does not require us to adopt other assumptions on which they base their work. Here we have argued the advantages of conflict perspectives over equilibrium perspectives in accounting for the timing and focus of educational reform. In this sense we concur with Simmons (1983b: 13) that "the historical and statistical evidence appears to tip the balance in favor of the conflict theory." However, we reach our conclusion regarding the explanatory power of the conflict approach on somewhat different grounds than Simmons does.

Simmons' conclusion is based on a somewhat over-simplified conception of equilibrium (and conflict) paradigms. He seems to assume that the presence of overt disagreement conflict around reform efforts rules out an equilibrium approach. For instance, he concludes that "the experience of educational reform is impossible to analyze unless we systematically examine conditions of conflict and power" (Simmons & Esping-Anderson, 1983: 425).

Power is certainly not a concept alien to equilibrium tradition. And overt conflict can be understood within an equilibrium perspective as functional (or dysfunctional) in the same way that deviance is functional: it can clarify the boundaries of existing structures and values and precipitate change needed to reestablish equilibrium when other aspects of the system have changed (see Coser, 1962; Dentler & Erikson, 1959). The issue for the conflict perspective is not whether or not overt conflict occurs, but whether the interests of different social class, racial/ethnic, national, or gender groups are inherently and fundamentally in conflict.

The timing and focus of educational reform cannot be adequately understood by conceiving society as a homeostatic system characterized by consensual relations transacted through persuasian and led by those who possess a "moral force." Instead, we start with the assumption that at the world-system and national levels society is inherently conflict-laden. Different nations, classes, ethnic/racial groups, and gender groups occupy different positions in extant relations of domination and subordination. Thus, there are always groups who would like to or are trying to restructure education to serve their interests. At any time there is likely to be various groups (both inside and outside of education) expressing different criticism about education and articulating the "reforms" that should be implemented. Some, but by no means all, of these concerns and proposed solutions become a part of large scale educational reform efforts when broader economic, cultural, and political struggles reach a crisis point. But we are not merely proposing a Weberian status group conflict model, because we conceptualize the terrain on which such struggles take place as containing fundamental structural contradictions. These contradictions

constrain and enable the thoughts and actions of different groups of actors. They constitute the dynamics and tensions upon which people go about socially constructing their reality, including the way education is formed and reformed.

Educational reform, therefore, would be more likely to occur during periods of economic crisis and restructuring in the world system and related or other economic and political crises in nation-states, when the contradictions (e.g., accumulation and reproduction processes) are not being successfully mediated by existing ideological and structural arrangements. And it is in the space (or opportunities for movement) created by these contradictions that the struggles take place, not only in education but also in other segments of the state, in the cultural sphere, and in the economy. Unless there is a relatively independent and well-organized mass movement (see Paulston, 1980), economic elites and their allies are likely to use their control over the means of production and distribution of knowledge, their greater power with respect to the state policy-making and policing, and their dominant position in the economy to shape the focus of the rhetoric and action of educational reform. Nevertheless, because of the contradictions within and between the economy, education, and the state, this shaping will not always lead in the same direction nor even operate in the short run in all respects in the interest of economic elites. The contradictory terrain provides some opportunities for other groups to shape the discourse and action in their interests, and economic and state elites, in seeking to pursue both accumulation and reproduction "structural imperatives," find themselves working over the short term in ways that seem to favor other groups, but in the long run help to sustain or restructure

social relations in their favor.

We also adopt a conflict perspective rather than an equilibrium approach because we wish to avoid the problem identified by Paulston (1983: 51) that most of the studies of educational reform, which have been based on equilibrium assumptions, "present a narrow, unsophisticated, and largely technical assessment of why and how reforms take place" (Paulston, 1983: 51). Developing a complex, theoretically and politically sophisticated understanding of various levels of dynamics associated with educational reform rhetoric and action is not just an academic exercise, nor is it solely for guiding the policy-making and policy-implementing processes as undertaken by current or future government officials. Our comprehension of these phenomena must be profound as well to shape plans and actions for progressive action by groups (including educators) who seek to transform existing social relations (Ginsburg, 1989).

This is not to argue that efforts to intervene in the discourse and transactions concerned with educational reform can substitute for other kinds of struggle. By suggesting that we focus our attention and activity on the ideological and superstructural levels (e.g., institutions such as the education system and the state), we are not proposing that fundamental change can be brought about without struggling for change in the economic base, as Epstein (1978) suggests some radical educators do. What we are claiming, though, is that because of contradictions in the economy, culture, and the state, some interventions in educational reform discourse and activity may have progressive effects at least in the short term. Moreover, the experience and solidarity with various groups that can be built in the context of such activity may be advantageous in building social and

political movements focused on broader issues, including challenging unequal race, gender, and class relations and transforming the world economic system into one that is primarily structured around meeting human needs as opposed to producing profit. Thus, while we do not want to celebrate educational reform as necessarily change for the better, as some equilibrium theorists do, we also do not fully agree with Frank's (1969: 408-9) conclusion that the "intellectual and Marxist will have to decide whether he will remain inside pursuing reformism, or outside with the people making revolution." As we have discussed, given the contradictions within education, culture, the state, and national and world economic systems, it may be possible to be engaged in both reformist and revolutionary activity with an eye toward constructing fundamental change through both strategies.

ENDNOTES

1. Simmons (1983a: 74) treats the political and economic as variables rather than as processes, dynamics, or arenas of contradictions. Thus, he identifies political factors (type of regime, nature of leadership, its legitimacy, and kinds of coalitions) and economic factors (type of economy, labor-market needs, degree of economic inequality, and avilability of financial resources). In this way historical process and struggle are conceptualized as causal relations between selected structural variables. The theoretical assumptions implied seem to fit most comfortably within system theory, though in a figure presented in another chapter in the same book Simmons (1983b: 11) appears to adopt a Weberian-type status or interest group perspective. In this way his assumptions seem more similar to Archer's (1979), except that Simmons gives explicit mention to "international experiences and pressures."

2. Within conflict approaches one can contrast Weberian or status group conflict models (e.g., Archer, 1979; Banks, 1987; Collins, 1979) that give primacy to cultural and political spheres and Marxist class/imperialist conflict models that emphasize economic relations. The Weberian approaches tend to analyze educational reform in terms of struggles between ethnic/racial or economic status groups based on competition for scarce resources, e.g., educational credentials, but also jobs, income or wealth, status, and political power. Although Marxist approaches also attend to struggle, more emphasis is given to structural contradictions in the economy, ideology, and the state, and the focus is not so much on the distribution of resources as on exploitation, alienation, and control over the means of production. For Marxists struggle is linked to these contradictions, and to efforts to mediate and thus reproduce or to challenge the contradiction imbedded in extant unequal social relations. Here we will draw primarily on Marxist perspectives within the conflict paradigm. Although not developed here, it is possible to explain educational reform from liberal and radical feminist perspectives. Reform efforts would be perceived as the result of women and men struggling for credentials and other resources (liberal feminist perspective) or women and men struggling to mediate and challenge contradictory gender (as well as class and race) relations (e.g., Ginsburg, 1988).

3. Archer (1979) also emphasizes that change in education, including reforms, occur as a result of functional incompatibilities. However, she argues that these dysfunctions or "obstructions" do not automatically lead to change due to some evolutionary process or homeostatic mechanism in society. Nor are changes "presumed to be more adaptive, efficient, stable or legitimate than proceding forms of education" (Archer, 1979: 143). Rather, from her Weberian conflict perspective Archer views efforts to reform education arise as the result of competing or conflicting groups' social interaction which is "conditioned" (not determined) by structural factors as perceived by

the actors involved.

4. As Carnoy (1976: 249-51) comments in his review of Coombs' (1968) book, the solutions proposed included "the introduction of capital intensive methods like technology to replace teachers. ... [Additionally,] the economy and the schools must be aligned so there are more jobs available and more appropriate training in the schools to fill those jobs."

5. A caveat should be noted to this point. State revenue is extracted not only from surplus value accumulated by capitalists through exploitation of workers, but also from worker's wages. This is part of the reason why struggles in the state are not just over the amount of taxes to be collected but the form of taxes, on corporation profits, investors' capital gains, property or wealth, or earned income.

6. However, we must again clarify (see also note 2) that the revenue acquired by the state through taxation can be drawn from capital's surplus value or from workers' income.

7. Archer (1979) focuses our attention on three types of "negotiation" among elites of conflicting groups or institutions:
   a) "political manipulation" or working at the local or national level to influence government policy on education;
   b) "external transaction" or efforts initiated by groups outside education or the state to obtain additional or better service by offering to provide resources directly to educators; and
   c) "internal initiation" or efforts initiated by educators to supply expertise or other services for groups in return for additional resources.

   In Archer's view political manipulation is the main or only avenue for negotiation in "centralized" education systems, while external transactions and internal initiation are also relevant in "decentralized" systems.

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